

Child Trust Fund (CTF) to a Forester Life Child Trust Fund Transfer Application Form

Please complete this form if you would like to transfer your child's CTF account held with another provider to the Forester Life Child Trust Fund. **You must be the Registered Contact of the existing CTF account.** Please complete the form in **BLOCK CAPITALS** and **black ink**. It is very important to read the information and sign the 'Declaration and Transfer Authority' section. Then return it to Freepost RSKL-ATSJ-JHYS, Forester Life Ltd, Foresters House, 2 Cromwell Avenue, Bromley BR2 9BF - no stamp is required.

1. Applicant's details (Registered Contact)

Title: Mr / Mrs / Miss / Other	<input type="text"/>	Address (permanent residence)	<input type="text"/>
Forename(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tel. No. (in the event of queries)	<input type="text"/>	Postcode	<input type="text"/>
Gender	Male <input type="checkbox"/>	Female	<input type="checkbox"/>
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>

2. Child's details

Title	<input type="text"/>	Address (permanent residence)	<input type="text"/>
Forename(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	Male <input type="checkbox"/>	Female	<input type="checkbox"/>
Date of birth	<input type="text"/>	Postcode	<input type="text"/>
Child's Unique Reference No.	<input type="text"/>		

3. Current CTF details

Name of CTF provider	<input type="text"/>	Account No.	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>		

Please note that the Forester Life CTF is a Stakeholder account.

4. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information. This is further explained in more detail in our Privacy Policy.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at data.protection@foresters.co.uk or at the above address.

Personal information is information that identifies you and the child, is about you and the child and is provided through your dealings with us. It includes your names, addresses, contact

details, dates of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you and the child.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share the information with our service providers, identity verification services such as credit reference agencies, and

other parts of the Foresters organisation. We will not disclose any of the information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain the information for as long as the child is a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to the information are set out in our Privacy Policy. This is available on our website foresters.com or by request from Customer Services on 0333 600 0333.

The policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use the personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of the information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit www.ico.org.uk/global/contact-us/email/ or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using the personal information.

Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

If you prefer NOT to receive marketing via electronic methods please tick the box

5. Declaration and Transfer Authority

I apply to transfer the CTF detailed in this application to Forester Life Limited. I confirm that to the best of my knowledge and belief all of my answers are true and complete.

I declare that:

- I am 16 years of age or over;
- I have parental responsibility for the child;
- I am the Registered Contact for the CTF; and,
- I have received the CTF Key Information Document and brochure, which I have read.

I authorise Forester Life Limited:

- to hold the child's HM Revenue & Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash;
- to make on behalf of the child any claims to relief from tax in respect of CTF investments; and,
- to use the child's and my personal information for the purpose set out under 'Using your Personal Information' section.

I am aware that:

- a copy of my application and specimen Plan Document are available on request; and,
- the CTF transfer will not take place until expiry of the 30 day cancellation period.

I agree to the CTF Terms and Conditions.

I confirm that I have not been provided with any financial advice to transfer a CTF.

I confirm I have read this Declaration in full and wish for this transfer application to proceed.

Signature of applicant

Date Signed